

# Women in Private Markets Summit North America 2024

## Women in Private Markets Summit: North America 2024

### Agenda

#### Day one: May 15

08:00

**Registration and coffee**

08:45

**PEI Welcome**

8:50

**Chairperson's welcome**

**Laurie Mahon**, Senior Advisor, **Infrastructure Markets**

09:00

**Keynote: Managing private markets in a fluid environment**

**Andrea Auerbach**, Partner and Head of Global Private Investments, **Cambridge Associates**

09:30

**Allocations and strategic choices for investors in private markets**

- Dealing with the denominator effect: to what extent are many investors still over-allocated to private markets?
- The evolution of LPA terms: investor perspectives
- Investor views on GP strategies including continuation funds, margin loans & NAV financing
- Predictions for their allocations in the next decade: which strategies will see more allocations?

**Jennie Benza**, Investment Manager, Private Markets, **General Electric Pension**

**Leslie Vargas**, Senior Portfolio Manager, **Resolution Life US**

**Petya Nikolova**, Deputy CIO and Head of Infrastructure Investments, **New York City Comptroller's Office**

**Anne Duggan**, Managing Director, **Partners Capital**

10:10

**How are the leading funds in private markets tackling their DEI deficit?**

- Example of strategies employed by funds to address internal DEI deficits.
- Analyzing initiatives aimed at promoting DEI within the fund structure and culture
- Assessing the integration of DEI principles across the funds' investment portfolios and decision-making processes.

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- Exploring the impact of DEI-focused actions on fund performance

Moderator: **Marta Castelli**, Methodologies Sector Lead, Corporates & Infrastructure, **S&P Global**  
**Kara Helander**, Partner and Chief Diversity, Equity, and Inclusion Officer, **Carlyle**  
**Kerryann Benjamin**, Chief Diversity Officer and Head of Talent Development, **KKR**  
**Tracy Stuart, CFA**, Managing Partner and Chief Executive Officer, **Corbin Capital Partners**

10:50

## Coffee & Networking

11:20

### The continued rise of secondaries in private markets

- How is the surge in inflation and higher interest rates affecting secondaries markets?
- To what degree is the decline in M&A activity influencing market dynamics?
- Beyond PE: an exploration of the increase in secondaries in wider private markets
- How will the market evolve and grow in the next decade?

Moderator: **Sijia Cai**, Partner, Investment Management, **Davis Polk & Wardwell**  
**Cari Lodge**, Managing Director, **CF Private Equity**  
**Tori Buffery**, Partner, **Morningside Capital**  
**Wandy Hoh**, Head of Infrastructure Secondaries, **Macquarie Group**

12:00

### Democratization of private markets: the emerging landscape in the US and globally

- Providing an overview of the scope of the opportunity
- Investigating potential risks associated with democratization and proposing effective mitigation strategies
- Analyzing the impact of democratization on GP/LP alignment
- Considering some of the innovative strategies that have been launched and what the future could bring

**Lisa Larsson**, Managing Director, **StepStone Group**  
**James Del Gaudio**, Managing Director, Head of Private Markets, **Pennsylvania, Public School Employees' Retirement System**  
**Jenn Phillips**, Chief Revenue and Growth Officer, **Forge Global**  
**Kendra Corbett**, Partner, **Cloverlay**

12:35

### Clean tech 2.0: private markets and the transition to net-zero

- How has the IRA transformed activity?
- Innovative ways to invest in an asset class outside of the usual risk/return for the asset class

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- The intersection of PE/venture/growth/infrastructure for investing in the energy transition
- How are managers getting LPs comfortable with the different risk/return of investments?

Moderator: **Alexandra Wilde**, Partner, **Clifford Chance**





**Tara Mei Smith**, ESG Integration Officer, **NYC Office of the Comptroller**

**Ashli Aslin**, Senior Analyst Real Assets and Infrastructure, **Albourne**

**Jamie Vermie**, Managing Principal – Impact Investing, **Allstate Investments**

13:10

Lunch

 <p><b>Women in Infrastructure Forum</b></p>	 <p><b>Women in Private Equity Forum</b></p>	 <p><b>Women in Real Estate Forum</b></p>	 <p><b>Women in Private Debt Forum</b></p>
<p>14:00 <b>Opening remarks</b> <b>Laurie Mahon</b>, Senior Advisor, <b>Infrastructure Markets</b></p> <p>14:05 <b>The state of play in the North American infrastructure market</b></p> <ul style="list-style-type: none"> <li>- Is the asset class living up to its reputation as a hedge against inflation?</li> <li>- Considering the performance of different sub-asset classes in the current environment</li> <li>- Where are managers seeing opportunities?</li> </ul> <p><b>Kemi-Christina Abdul</b>, Managing Director, <b>BlueHaven</b> <b>Anna Dayn</b>, Managing Partner, <b>New End</b> <b>Leonarda Orani</b>, Managing Director Infrastructure US,</p>	<p>14:00 <b>Opening remarks</b></p> <p>14:05 <b>The state of play in North American private equity</b></p> <ul style="list-style-type: none"> <li>- Assessing private equity's performance in relation to other asset classes:</li> <li>- Strategies for enhancing PE returns in challenging times</li> <li>- Discussion around market innovations that managers are employing</li> </ul> <p>Moderator: <b>Virginia Lantz</b>, Vice President, <b>Insight Sourcing</b>, part of <b>Accenture</b> <b>Anne Philpott</b>, Managing Director, <b>Churchill Asset Management</b> <b>Lili Cai</b>, Private Equity</p>	<p>14:00 <b>Opening remarks</b> <b>Gila Cohen</b>, Partner, Chief Investment Officer, <b>Vanbarton Group</b></p> <p>14:05 <b>The state of play in North American real estate</b></p> <ul style="list-style-type: none"> <li>- How is real estate performing amidst macro and market challenges?</li> <li>- In which sub-sectors and regions are there still opportunities?</li> <li>- What next for the asset class?</li> </ul> <p>Moderator: <b>Dan Winters</b>, Senior Director, <b>GRESB</b> <b>Julie Donegan</b>, Director of Real Estate, <b>CaSTRS</b> <b>Vicky Shiff</b>, CEO, <b>Avrio Real Estate</b> <b>Maggie Coleman</b>, Chief Investment Officer, North</p>	<p>14:00 <b>Opening remarks</b></p> <p>14:05 <b>The state of play in North American private credit</b></p> <ul style="list-style-type: none"> <li>- How does debt compare to other strategies in the current climate?</li> <li>- To what extent is the market concerned by the refinancing risk? How are firms evolving their strategies in a challenging fundraising environment?</li> </ul> <p>Moderator: <b>Susan Burkhardt</b>, Partner, <b>Clifford Chance</b> <b>Katherine McElroy</b>, Managing Director, Infrastructure Debt US, <b>Fiera Capital</b></p>

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<p><b>Ardian</b></p>	<p>Investment Professional, <b>Swiss Re</b> <b>Jana Wayne</b>, Managing Director – Head of Procurement, <b>Hunter Point Capital</b></p>	<p>America, Real Estate, <b>Manulife Investment Management</b></p>	<p><b>Keirsten Lawton</b>, Co-Head of US Private Equity Research, <b>Cambridge Associates</b> <b>Meenal Mehta</b>, Co-Head of Underwriting, Diversified Lending, <b>Blue Owl Capital</b></p>
<p>14:45 <b>Short turnaround break</b></p>			
<p>14:50 <b>Digital infrastructure investing</b></p> <ul style="list-style-type: none"> <li>- The impact of interest rates and inflation on digital infrastructure</li> <li>- Are there still opportunities in an ultra-competitive space?</li> <li>- The impact of emerging technologies such as AI &amp; machine learning on digital infrastructure</li> </ul> <p><b>Melannie Pyzik</b>, Head of Investor Solutions, <b>Argo Infrastructure Partners</b> <b>Canan Anli</b>, Senior Advisor, <b>PMP Strategy</b> <b>Danielle Hunt</b>, General Counsel, <b>Tiger Infrastructure Partners</b></p>	<p>14:50 <b>Dealmaking in US private equity</b></p> <ul style="list-style-type: none"> <li>- Are valuations still too high?</li> <li>- Evaluating whether dealmaking activities are showing signs of recovery</li> <li>- Identifying hotspots and areas of opportunity</li> </ul> <p>Moderator: <b>Sebnem Caglayan</b>, Managing Director, <b>S&amp;P Global</b> <b>Julia Wittlin</b>, Partner, <b>RedBird Capital Partners</b> <b>Lane McDonald</b>, Managing Director, Strategy &amp; Operations, <b>Omers</b> <b>Chenkay Li</b>, Managing Director, Direct Equity Investments, <b>Hamilton Lane</b></p>	<p>14:50 <b>Where next for logistics and industrial?</b></p> <ul style="list-style-type: none"> <li>- Do they remain attractive for investors?</li> <li>- Finding opportunities in a crowded market</li> <li>- Innovative approaches to sustainability and value creation to drive returns</li> </ul> <p>Moderator: <b>Anne Gales</b>, Partner &amp; Co-Founder, <b>Threadmark</b> <b>Sarah Jancot</b>, Senior Investment Manager, Unlisted Real Estate, Global Logistics, <b>NBIM</b> <b>Geneviève Brassard</b>, Director, Real Estate Investments, <b>PSP Investments</b></p>	<p>14:50 <b>The rise of sponsorless deals</b></p> <ul style="list-style-type: none"> <li>- What is the appeal of non-sponsored deals for investors and borrowers?</li> <li>- How are managers sourcing deals and do they compete with banks?</li> <li>- How does a manager’s skillset differ to sponsored transactions?</li> </ul> <p>Moderator: <b>Sweta Chanda</b>, Managing Director, Head of Business Strategy, <b>Monroe Capital</b> <b>Kerry Dolan</b>, Managing Partner, <b>Brinley Partners</b> <b>Kalina Berova</b>, Portfolio Manager, <b>BCI</b> <b>Shamafa Khan</b>, Managing Director and Head of Investor Relations and Marketing, <b>Crayhill Capital Management</b></p>
<p>15:25 <b>Short turnaround break</b></p>			
<p>15:30 <b>Investing in emerging technologies: hydrogen, batteries, EV &amp; more</b></p>	<p>15:30 <b>Considering how different strategies are faring in a</b></p>	<p>15:30 <b>Analyzing the current landscape of real estate debt investing</b></p>	<p>15:30 <b>Special situations and distressed debt</b></p>



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<ul style="list-style-type: none"> <li>- Examining business models in emerging strategies</li> <li>- Considering the extent to which these investments are infrastructure</li> <li>- Investigating the long-term sustainability of battery technology and electric vehicle charging solutions</li> </ul> <p><b>Vidyu Kishor</b>, Director, Renewables and Grid Solutions, <b>Osaka Gas USA</b> <b>Dr. Barbara Weber</b>, Founding Partner, <b>B Capital Partners</b> <b>Irene Mavroyannis</b>, Global Co-Head of Business Development, Infrastructure, <b>Partners Group (USA)</b></p>	<p><b>more challenging environment</b></p> <ul style="list-style-type: none"> <li>- Defining the mid-market: scale and strategies</li> <li>- What strategies and size of funds are faring well in a challenging market?</li> <li>- How are investors viewing different strategies on performance and DEI? And is this impacting investment decisions?</li> </ul> <p><b>Catherine Hatch</b>, Private Equity Allocator, <b>Alaska Permanent Fund Corporation</b> <b>Aiyu Yuan Nicholson</b>, Partner, <b>StepStone Group</b> <b>Sheryl Schwartz</b>, Chief Investment Officer, <b>ALTI</b> <b>Kavita Datta</b>, Investor Relations and Business Development, <b>Cebile Capital</b></p>	<ul style="list-style-type: none"> <li>- Investor views on real estate debt during turbulent times</li> <li>- How are interest rates and inflation affecting real estate debt?</li> <li>- Predictions for the next decade</li> </ul> <p><b>Robin Potts</b>, Partner and CIO, <b>Canyon Partners Real Estate</b> <b>Sarah Schwarzschild</b>, Chief Operating Officer, <b>Mavik Capital Management</b> <b>Wendy Cai-Lee</b>, CEO and Founder, <b>Piermont Bank</b></p>	<ul style="list-style-type: none"> <li>- Outlining the scale of the opportunity as more companies run into trouble</li> <li>- To what extent are managers having to adapt their skillsets in the new normal?</li> <li>- Identifying sectors and strategies where there are opportunities</li> </ul> <p>Moderator: <b>Maja Zerjal Fink</b>, Partner, <b>Clifford Chance</b> <b>Lexi Fallon</b>, Formerly - Special Situations, <b>CPPIB</b> <b>Tingting Zhang</b>, Founder &amp; Chief Executive Officer, <b>TerraCotta Group</b> <b>Eric Newman</b>, Treasury Manager, <b>City of Stamford</b> <b>Beth Duggan</b>, Associate General Counsel, <b>Polen Capital</b></p>
<p>16:05 <b>Coffee &amp; networking</b></p>			
<p>16:25 <b>The resilience of infrastructure debt</b></p> <ul style="list-style-type: none"> <li>- How is infrastructure debt performing in the current economy?</li> <li>- Examining the pivotal role played by infrastructure debt in financing critical projects</li> </ul>	<p>16:25 <b>Emerging manager update: how are new strategies performing?</b></p> <ul style="list-style-type: none"> <li>- Fundraising tips for emerging managers in a tough market</li> <li>- Laying the groundwork for lasting success</li> <li>- Case studies from the past 12 months</li> </ul>	<p>16:25 <b>Multifamily investing: trends, regulation and potential for expansion</b></p> <ul style="list-style-type: none"> <li>- Why are more firms targeting opportunities in multifamily?</li> <li>- The importance of regulation in attracting investors</li> </ul>	<p>16:25 <b>Opportunities in the growing speciality finance space</b></p> <ul style="list-style-type: none"> <li>- How are specialty finance companies changing business models?</li> <li>- Investigating the adoption of advanced data analytics and</li> </ul>

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<ul style="list-style-type: none"> <li>- Expectations for fundraising in the next year</li> </ul> <p><b>Mansi Patel</b>, Managing Director, Head of Infrastructure Debt, <b>MetLife Investment Management</b></p> <p><b>Marie-Noël Ouellet</b>, Managing Director, Infrastructure Financing, <b>CDPQ</b></p> <p><b>Kate Dorsey</b>, Principal, <b>Stonepeak</b></p>	<p><b>Liz Campbell</b>, Chief Investment Officer, <b>Portfolio Advisors</b></p> <p><b>Gayatri Sarkar</b>, Founder and CEO, <b>Advaita Capital</b></p> <p><b>Michelle Jacobi</b>, Managing Director, <b>Gatewood Capital</b></p> <p><b>Agata Rzamek Praczuk</b>, Director, <b>Metlife Investment Management</b></p>	<ul style="list-style-type: none"> <li>- Considering opportunities beyond the US in this sub-asset class</li> </ul> <p>Moderator: <b>Mary D'Souza</b>, CIO, <b>Misha Investments</b></p> <p><b>Erin Miller</b>, Executive Managing Director, <b>NEWMARK</b></p> <p><b>Maddi Sampson</b>, Vice President, International Real Estate, <b>QuadReal Property Group</b></p> <p><b>Erin Beitz</b>, Senior Vice President, Residential, <b>Rockhill Management</b></p>	<p>technology-driven solutions</p> <ul style="list-style-type: none"> <li>- Predictions for the next 5 years</li> </ul> <p>Moderator: <b>Michelle Noyes</b>, Managing Director, Head of Americas, <b>AIMA</b></p> <p><b>Nicole Byrns</b>, Alternative Asset Investor, <b>Independent</b></p> <p><b>Meggie Daoust</b>, Senior Director, Capital Solutions, <b>CDPQ</b></p> <p><b>Kelsey Read</b>, Director, Capital Markets, <b>Castlelake</b></p> <p><b>Rebecca Chia</b>, Head of Business Development and Investor Relations, <b>Atalaya Capital Management</b></p>
<p><b>17:10</b> <b>Short turnaround break</b></p>			
<p><b>17:15</b> <b>Crystal ball session: what does the future hold for infrastructure?</b></p> <ul style="list-style-type: none"> <li>- The extent to which infrastructure will move further into other asset classes</li> <li>- Predictions for fundraising and deal volume in the next 18 months</li> <li>- What is the next megatrend in infrastructure investing?</li> </ul> <p>Moderator: <b>Jane Bowes</b>, Managing Director, <b>Threadmark</b></p> <p><b>Janice Ince</b>, Managing Director, <b>Pantheon</b></p>	<p><b>17:15</b> <b>Venture &amp; growth investing in a bear market</b></p> <ul style="list-style-type: none"> <li>- How have investors adapted to the different macro-environment?</li> <li>- Understanding the strategies employed by investors to navigate risk and seize opportunities</li> <li>- Evaluating the role of diversification and adaptive portfolio management</li> </ul> <p><b>Summer Zhao</b>, Investment Director, <b>Lafayette College</b></p> <p><b>Rudina Seseri</b>, Founder &amp; Managing Partner, <b>Glasswing Ventures</b></p> <p><b>Kirsten Morin</b>, Partner,</p>	<p><b>17:15</b> <b>The future of offices in North America</b></p> <ul style="list-style-type: none"> <li>- What will office investing look like in 10 years?</li> <li>- Future-proofing your office portfolio</li> <li>- Where in the US and globally are investors seeing opportunities?</li> </ul> <p>Moderator: <b>Tim Savage</b>, Clinical Assistant Professor, <b>NYU Schack Institute of Real Estate</b></p> <p><b>Marion Jones</b>, Managing Director, <b>JLL Capital Markets Americas</b></p> <p><b>Gila Cohen</b>, Partner, Chief Investment Officer, <b>Vanbarton Group</b></p>	<p><b>17:15</b> <b>Corporate credit in a changing environment</b></p> <ul style="list-style-type: none"> <li>- What is driving the opportunity set for flexible capital providers?</li> <li>- How to capitalize on corporate opportunities thru market cycles</li> <li>- Outlook for public and private opportunities</li> </ul> <p><b>Helena Wang</b>, Principal, Capital Solutions Group, <b>CPPIB</b></p> <p><b>Mary Rooney</b>, Managing Director, <b>JP Morgan</b></p> <p><b>Kristina Matthews</b>, Managing Director, Client &amp; Product Solutions, <b>Onex</b></p>

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<b>Abigail Leung</b> , Principal, <b>HOOPP Infrastructure</b> <b>Kate Roscoe</b> , Senior Managing Director, <b>Manulife Investment Management</b> <b>Sue Yang</b> , Investment Director – Next Gen, <b>Antin Infrastructure Partners</b>	<b>HighVista Strategies</b> <b>Stephanie Campbell</b> , General Partner, <b>The Artemis Fund</b>	<b>Rachel Loeb</b> , Chief Investment Officer, <b>Benenson Capital Partners</b>	
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17:50

Cocktail reception

## Day Two: May 16

08:00-9:00

### Invitation only think-tanks

*These sessions will allow women to speak freely about the issues impacting their office and asset class. It is a closed door, open conversation where attendees can benchmark ideas and share best practices to gain solutions for common concerns.*

- Infrastructure
- Private Equity
- Private Debt: **Sweta Chanda**, Managing Director, Head of Business Strategy, **Monroe Capital**
- Real Estate

9:10

### State of Private Markets: GP Perspectives on the evolution of alternatives

- How are managers modifying their approaches to navigate shifts in interest rates and inflation?
- To what extent are managers incorporating emerging technologies and innovative solutions to gain a competitive edge?
- Anticipating and navigating forthcoming regulatory changes affecting private markets
- Developing younger talent who are experiencing their first bear market

**Elisabeth Troni**, Managing Director, Fund Manager, **CBRE Investment Management**

**Lisa Sun**, Managing Director and Co-Head of the BlackRock Secondaries and Liquidity Solutions (SLS),  
**BlackRock**

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9:45

## **Fundraising in a more challenging environment**

- Developing a value proposition that articulates how you will thrive
- Adopting an investor-centric approach: how can managers differentiate themselves?
- Highlighting case studies to underscore your fund's ability to adapt and excel in difficult market conditions
- Learnings from those who have been on the road in the last 12 months

**Ilene Levinson**, Managing Director, Fund Investments, **Hamilton Lane**

**Alexandra Bazarewski**, Partner, **Rede Partners**

**Mahsa Zeinali**, Senior Vice President, Capital Partnering, **Reverence Capital Partners**

10:25

## **PEI Fundraising Report**

**Bill O'Connor**, Managing Director, **PEI Group US**

10:35

## **Making co-investments work for all: balancing benefits, fees and trust**

- Unlocking benefits for investors and fund managers
- Fee structures in co-investing: striking a balance
- Navigating potential challenges and considerations in co-investing
- GP-led continuation funds: fostering alignment and transparency

**Rachel Goldstein**, Investment Principal – Co-investments, **Partners Capital**

**Elizabeth Weindruch**, Managing Director, **Barings**

**Evy Carroll**, Senior Associate, Private Equity Co-investments, **Mercer**

**Catherine Saunders**, Managing Director, **Benefit Street Partners**

11:15

## **Coffee & networking**

11:45

## **ESG debate: how is sustainability evolving within private markets?**

- Assessing the extent to which polarisation is impacting advancements in sustainability within U.S. private markets
- Investigating how the Inflation Reduction Act has transformed the sustainability landscape
- Comparing progress in the US and Europe: is the gap narrowing or widening?
- How are managers dealing with investors with such contrasting views on sustainability?



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Moderator: **Ali Humphrey**, Managing Partner, **Arna**  
**Avantika Saisekar**, Managing Director of Sustainable Investing, **Wafra Inc.**  
**Angela Jhanji**, Managing Director, Sustainability - Private Capital, **EQT Partners**  
**Adriana Becerra Cid**, Sustainable Investment Lead for Private Assets, **Lombard Odier Asset Management**

**12:30**

## **Private Markets: Investment Committee**

*Three hand-picked fund managers will present investment case studies in this exclusive, data-driven and interactive format. Hosted by two experts, you'll have the chance to ask questions, share your thoughts and vote on the transactions in our very own investment committee.*

**Amy Wang**, Managing Director (Head of Private Credit), **Blue Earth Capital**  
**Priya Grewal**, Investment Manager, **Morrisson**

**13:15**

## **Themed Seated Networking Lunch Hosted by Mintz Group**

*A number of tables throughout the room and the exhibition hall. Attendees can choose which discussion they would like to join*

**Value Creation** – Jill Haberkern (Mintz Group)

**ESG** – Eleanor Warnick (Mintz Group)

**Culture Assessment** – Mike Karran (Mintz Group)

**Entering New Markets** – Liza Baron (Mintz Group)

**Managing Reputational Risk** – Kelsey Froehlich (Mintz Group)

**Navigating Controversies and Disputes in a Portfolio** – Jen Cherner (Mintz Group)

**Diligence for Better Relationships with Management** – Doug Chisholm (Mintz Group)

**Diligence Throughout the Investment Lifecycle** – Kathleen Hurt (Mintz Group)

**14:30**

**Close of conference**